PA HMIS – PATH Project Enrollment

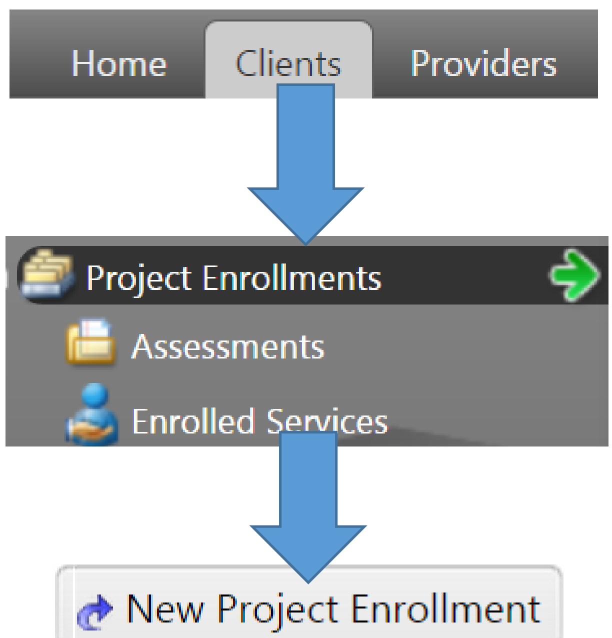
This quick reference guide outlines the components of the ClientTrack HMIS solution related to PATH project enrollment efforts.

PATH Project Workflow

PATH Projects within ClientTrack are used to record a client's contact participation. When the client qualifies for the program, it then tracks the services offered by the organization. A basic project includes both standard enrollment and exit functionality. It marks the time a client spends in active participation within the agency.

The PATH project workflow guides the user through the process of adding/changing household information, performing various assessments and enrolls the client into applicable projects.

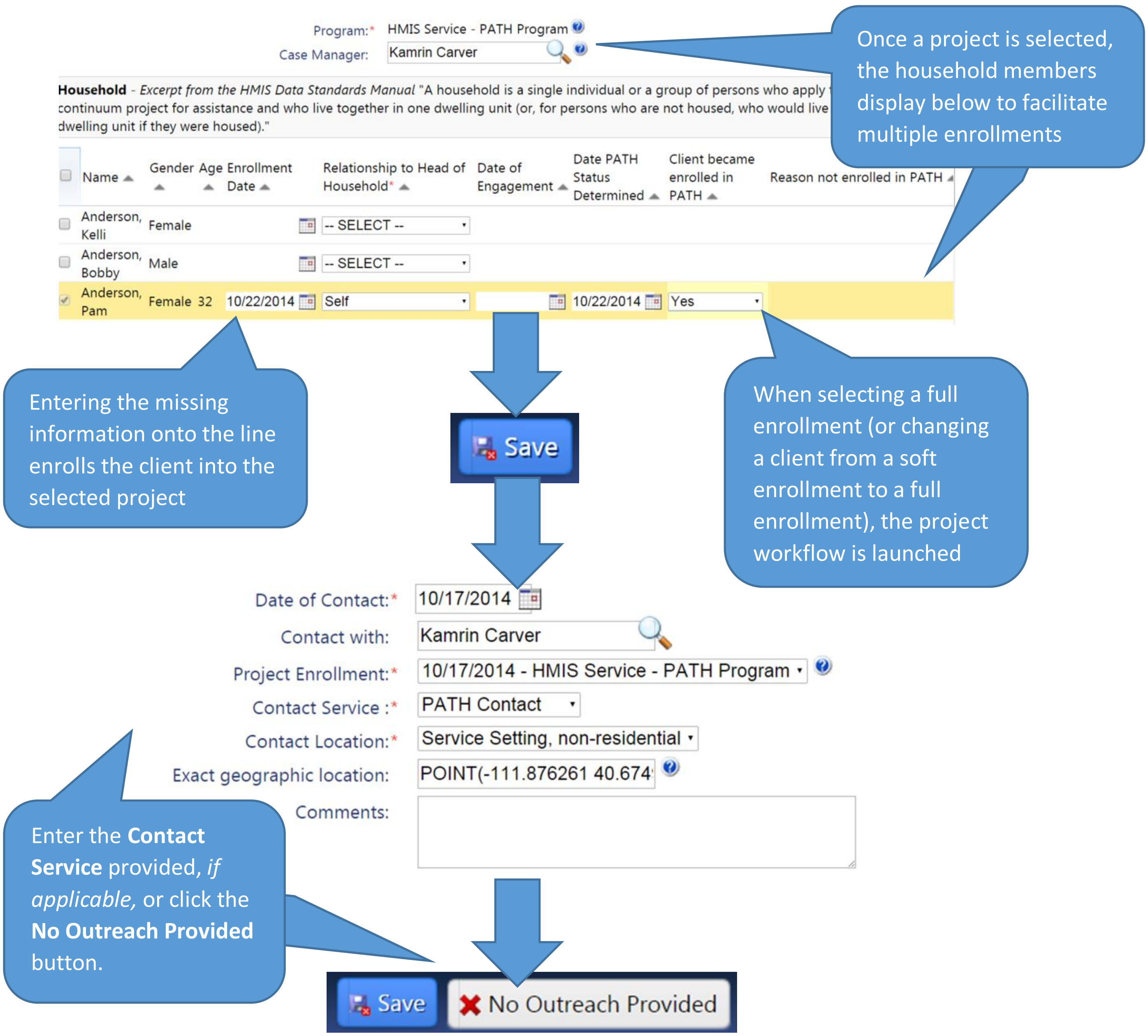
***Helpful Tip:** Each client being enrolled into a PATH project must have a data sharing policy enacted. A signed **Client Consent / Release of Information Form** is required prior to sharing any data globally throughout the system. Until project enrollment is complete, no data sharing policy is necessary.*



Project Enrollment

When enrolling a client into a PATH project, the system prompts the user to collect the data related to their PATH eligibility. If a client is not fully enrolled into the PATH project, the enrollment is categorized as a soft enrollment. Soft enrollments limit the client to associated Outreach Contacts.

Helpful Tip: *PATH users are to use soft enrollments only while engaged in the client information gathering or contact stages.*



Helpful Tip: The "Client become enrolled in PATH' enrollment element express whether it is a soft (no answer) or full (yes answer) enrollment type. A soft enrollment can be turned into a full enrollment at any time by using the "Complete PATH Enrollment function.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	PATH Enrollment Status
Current						
HMIS Service - PATH Program	1	10/24/2014		HMIS Service Agency	10/24/2014	Enrolled
Downtown - SSVF Homeless Prevention	1	10/23/2014		Downtown Shelter Services, Inc.	10/23/2014	N/A
HMIS Service - PATH Program	1	10/22/2014				Contact Only

Each PATH enrollment denotes it's soft (Contact only) vs. full (Enrolled) status

Transactional Sharing

Each transaction (i.e. enrollment, assessment, service, check-in records) and its sharing are based off of the client's data sharing policy and are shared throughout the system on the Client Dashboard and through individual transactional review screens based on this setting.

Each type of transaction recorded or edited in the system related to one of the four following transaction sharing setting recorded in the client's Data Sharing Policy. Transactions that are shared can be viewed by users outside of your organization, non-shared transactions will remain viewable only be your organization.

Globally Shared Transactional Elements

Pre-Enrollment Screenings: ☑
Project Enrollments: ☑
Project Assessments: ☑
Project Services: ☑

Pre-Enrollment Screenings: will relate to any individual assessment that is collected prior to a project enrollment for eligibility determination and service needs and is currently no used

Project Enrollments: related to the sharing of the full project enrollment record and exit enrollment information

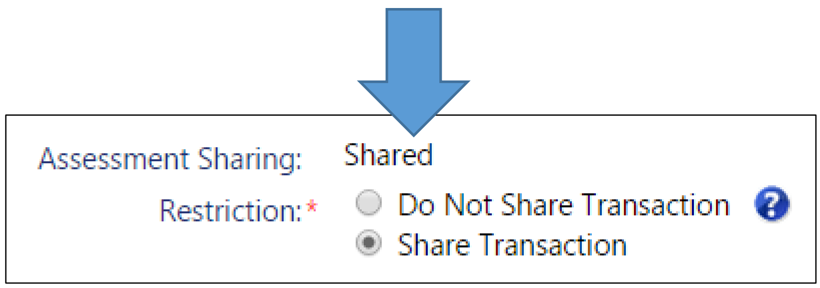
Project Assessments: relate to the individual assessments collected during a project enrollment such as Health, Income, Benefits, Employment, etc.

Project Services: relate to the individual services provided to the client such as Case Management or Rental Assistance and also cover housing/shelter check-ins

Helpful Tip: When a Project Enrollment record is set to "Not Shared", all assessments and services collected under that enrollment will remain hidden to outside organizations

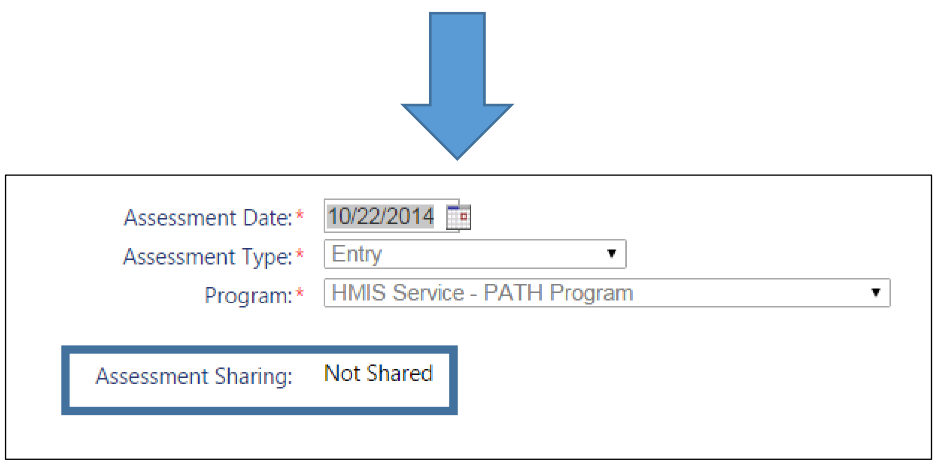
Shared Transactions

When the transactional sharing option is selected or checked, the user has the option to set the Sharing restriction setting for the transaction, which defaults to "**Share Transaction**".



Not Shared Transactions

When transactional sharing option is not selected or not checked, the Sharing restriction setting for the transaction defaults to "**Do Not Share Transaction**" and will be hidden on the screen.



Project Functions

After a client's project enrollment is complete, the user then has the option of viewing, editing, or adding to any of the existing assessments from the client dashboard. Household members can also be added, and the enrollment can be exited from the blue action arrow drop-down menu.

Edit Enrollment

Editing an enrollment consists of modifying the household information

	Name	Gender	Age	Enrollment Date	Relationship to Head of Household*
☑	Anderson, Pam	Female	32	10/19/2014	Self
☑	Anderson, Ricky	Male	13	10/19/2014	Son
☑	Anderson, Shania	Female	10	10/19/2014	Daughter

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Project Sharing: Shared

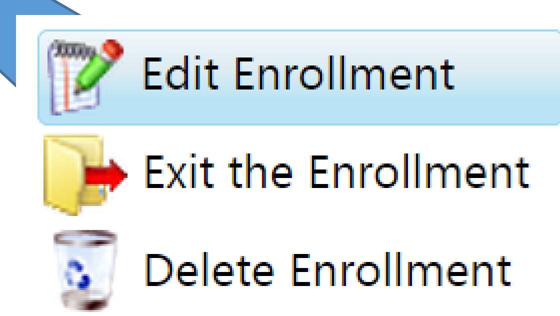
Restriction:* Do Not Share Transaction

View Case Members

The **Enrollment Case Members** screen allows the user to view a household and to modify the information of its individual members by selecting from the blue action arrow drop-down options. Household members can be edited, exited from the enrollment or deleted from the enrollment.

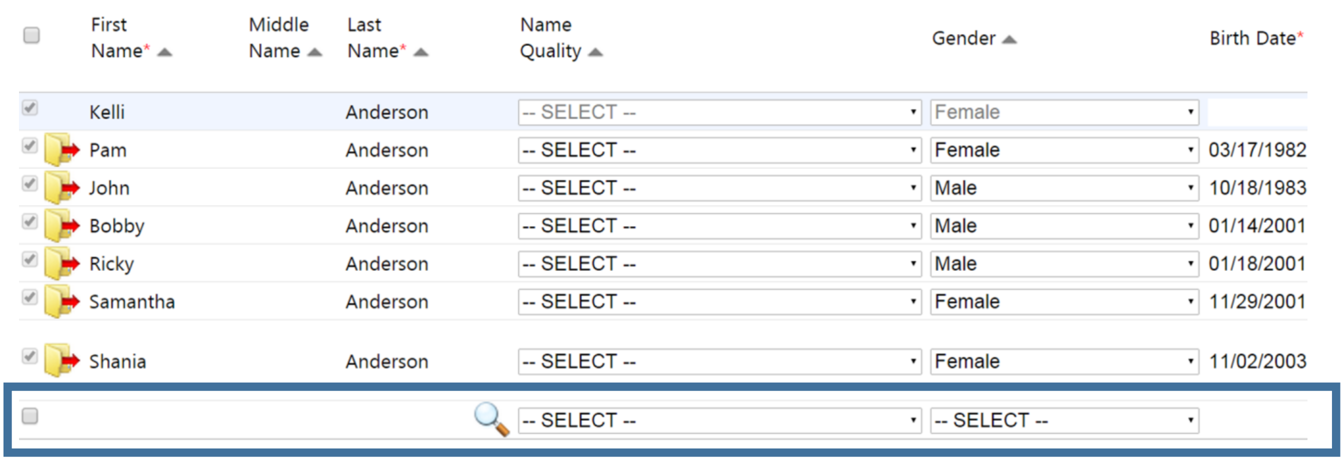
3 records found.

	Case Member	Grant	Relationship	Enroll Date	Exit Date	Client ID
	Anderson, Shania		Daughter	10/19/2014		10375
	Anderson, Ricky		Son	10/19/2014		10374
	Anderson, Pam		Self	10/19/2014		10370

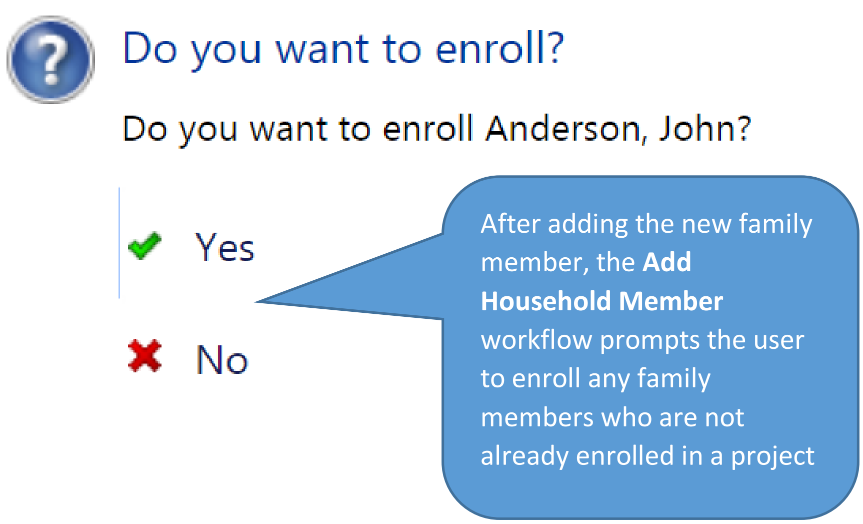


Add Household Member to this Enrollment

When adding household members, it is important to first verify that the client is not already listed as part of the family. If they do not display on the **Household Members** screen, add them to the blank row at the bottom of the list.

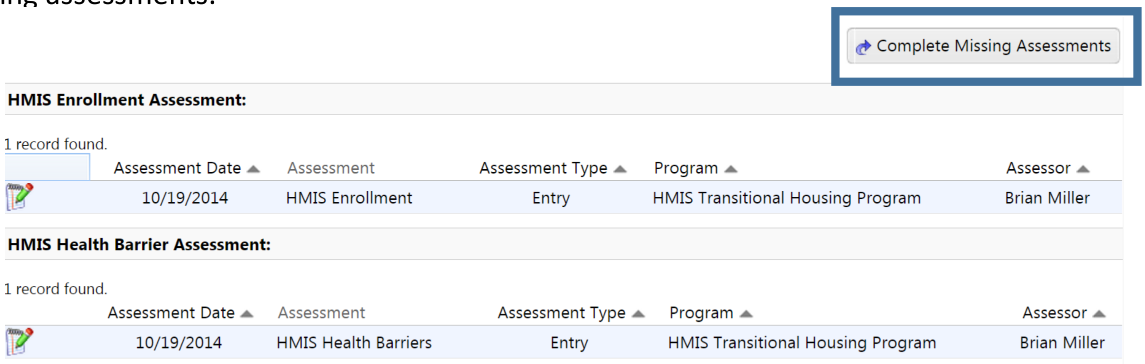


First Name*	Middle Name	Last Name*	Name Quality	Gender	Birth Date*
Kelli		Anderson	-- SELECT --	Female	
Pam		Anderson	-- SELECT --	Female	03/17/1982
John		Anderson	-- SELECT --	Male	10/18/1983
Bobby		Anderson	-- SELECT --	Male	01/14/2001
Ricky		Anderson	-- SELECT --	Male	01/18/2001
Samantha		Anderson	-- SELECT --	Female	11/29/2001
Shania		Anderson	-- SELECT --	Female	11/02/2003
			-- SELECT --	-- SELECT --	



Review Entry/Exit Assessments

The **Project Assessments** screen allows the user to view existing assessments and complete any missing assessments.



Complete Missing Assessments

HMIS Enrollment Assessment:

1 record found.

	Assessment Date	Assessment	Assessment Type	Program	Assessor
	10/19/2014	HMIS Enrollment	Entry	HMIS Transitional Housing Program	Brian Miller

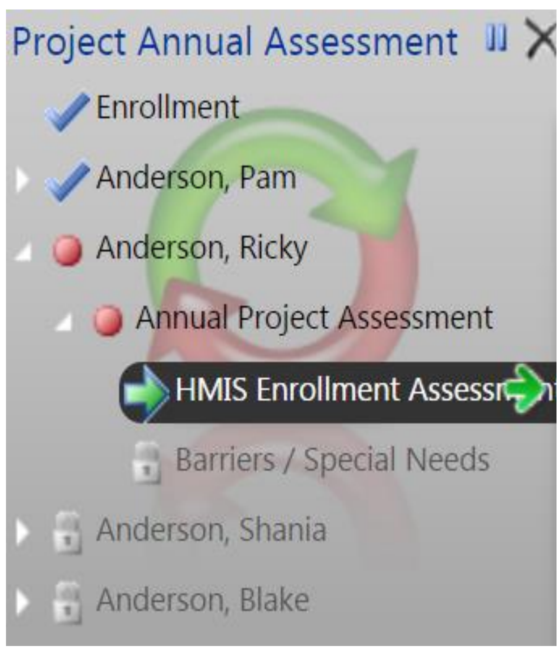
HMIS Health Barrier Assessment:

1 record found.

	Assessment Date	Assessment	Assessment Type	Program	Assessor
	10/19/2014	HMIS Health Barriers	Entry	HMIS Transitional Housing Program	Brian Miller

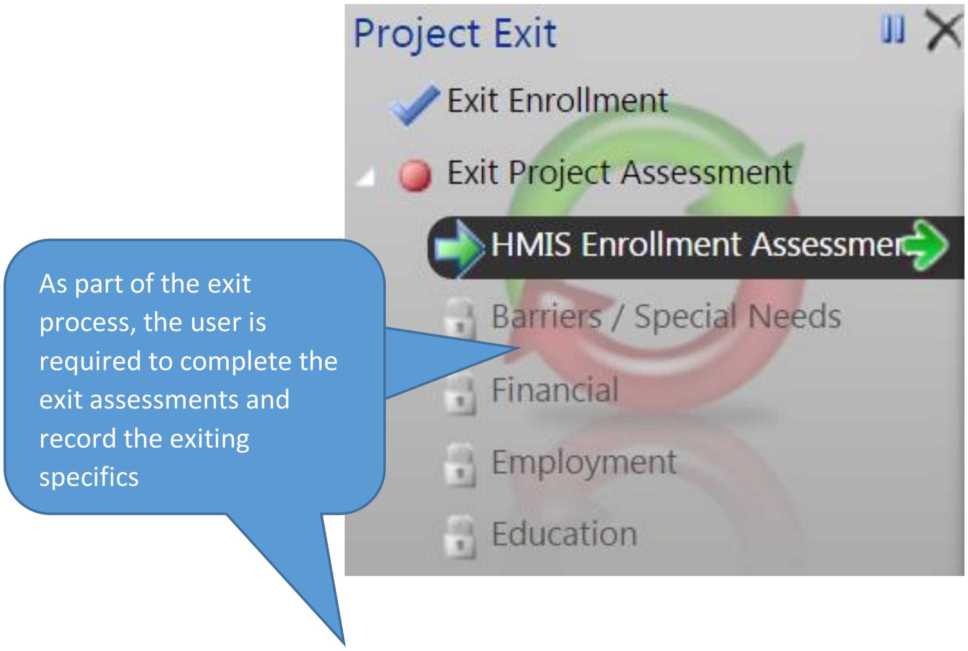
Perform Annual Assessments

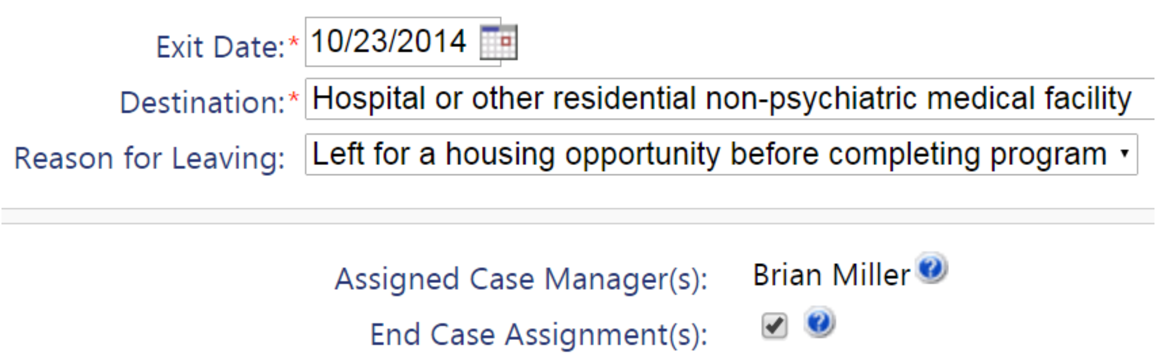
The **Project Annual Assessment** workflow is designed to annually assess all members of the household who are enrolled into a project. Users may update and modify information or skip assessments which do not require an update.



Exit the Enrollment

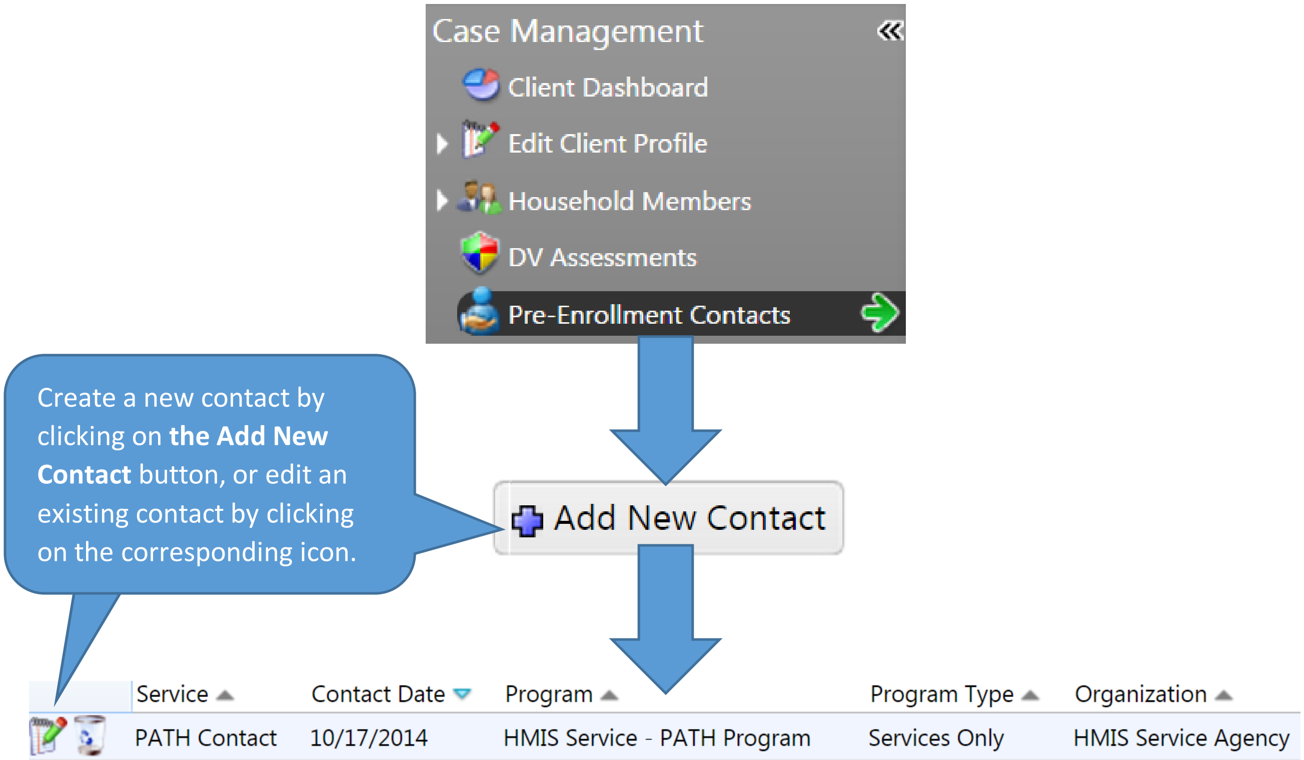
The system opens a **Project Exit** workflow to remove a client from project participation.





Pre-Enrollment Contacts

Contacts for PATH and street outreach are stored and can be edited on the **Client Outreach / Contact Services** screen.



***Helpful Tip:** If the client is not fully enrolled into the PATH program, it is considered a soft enrollment and will be 'auto-exited' after 30 days.*